



eFileTexas.gov

Court Administrator User Guide

Copyright and Confidentiality

Copyright © 2013 Tyler Technologies, Inc. All rights reserved.

All documentation, source programs, object programs, procedures, and any other materials supplied in connection with this document remain the exclusive property of Tyler Technologies, Inc., or in certain cases its licensees. Any use or reproduction (physical or electronic) of such materials, not specifically authorized by the Tyler Technologies license agreement, shall be deemed an agreement violation. Such a violation will terminate the licensee's right to use such material and can render the licensee liable for actual and punitive damages.

This notification constitutes part of the documentation and must not be removed.

All other brands and product names are trademarks or registered trademarks of their respective owners.

Contents

Copyright and Confidentiality	ii
List of Figures.....	iv
1 eFileTexas.gov Overview	1
Before You Begin	1
System Requirements	1
Page Navigation.....	2
Error Messages.....	3
2 eFileTexas.gov Home Page.....	5
3 Court Administration	7
Approving and Rejecting New Users.....	7
4 Manage Court User Accounts	8
Adding Court User Accounts	8
Editing Court User Accounts	9
Deleting Court User Accounts	9
5 Manage Court Attorney Accounts	11
Adding Court Attorney Accounts.....	11
Editing Court Attorney Accounts.....	13
Deleting Court Attorney Accounts.....	13
6 Manage Court Payment Accounts.....	15
Adding Court Payment Accounts	15
Editing Court Payment Accounts	16
Deleting Court Payment Accounts	17
7 Manage Court Information.....	18
Updating Court Information	18

List of Figures

Case Information Page	2
Breadcrumb Navigation	2
Data Table	2
Data Fields	3
eFileTexas.gov Workspace	3
Required Field Error Message	4
Invalid Entry Error Message	4
eFileTexas.gov Home Page	5
Approve New Users Tab	7
Court Users Tab Selected	8
Court User Roles	8
Court Users Tab Selected	9
Court Users Tab Selected	10
Manage Court Attorneys Screen	11
Attorney Number Field	12
Verify Attorney Information Window	12
Court User Roles	12
E-mail Address Field	13
Manage Court Attorneys Screen	13
Manage Court Attorneys Screen	14
Payment Accounts Tab Selected	15
Draw Down Selection Window	16
Payment Accounts Tab Selected	16
Payment Accounts Tab Selected	17
Court User Information Screen	18

1 eFileTexas.gov Overview

Topics Covered in this Chapter

◆ Before You Begin

The eFileTexas.gov solution enables registered users to file documents with the court anytime, anywhere, 24 hours a day, seven days a week. This highly automated, scalable system provides customers the opportunity to transition from an inefficient paper-based process to a streamlined technology-based electronic filing (e-filing) system.

Before You Begin

Before you begin, there are several items you should be aware of to assist you with the successful operation of your software.

Note: Depending on your setup, all features may not be available. As a result, your screen may vary from what is shown in the document.

System Requirements

This section describes the recommended system requirements to successfully use eFileTexas.gov.

- **Browser Requirements** – eFileTexas.gov supports current versions of the Windows operating system using Internet Explorer 7 or above or Firefox. If your browser does not meet these minimum requirements, please contact your network administrator.
- **Connection Requirements** – A high-speed Internet connection is recommended.
- **Minimum Screen Resolution** – For best results, a setting of 1024x768 or better is highly recommended. If necessary, users can set their monitors to 800x600 pixels, but doing so may compromise the graphic display.
- **Document Format** – PDF is the only format allowed for attaching documents when using eFileTexas.gov.

Page Navigation

The following describes how to navigate eFileTexas.gov and populate data fields throughout the filing process.

Figure 1.1 – Case Information Page

Navigate with Breadcrumbs

Breadcrumbs are a visual representation of the page you are currently on in the filing process. As you complete a page and move to the next page, the next page title illuminates to show you where you are in the process.

Note: Breadcrumb navigation requires information to be entered in a sequential order. You cannot move to the next breadcrumb until all of the required information on the current or previous page is completed.



Figure 1.2 – Breadcrumb Navigation

Populate the Data Table

The data table is populated using information entered or selected when completing the forms throughout the filing process.

Party Type	Name	Attorney
Plaintiff	Jamie Gillespie	
Defendant	Bob Jones	
Trustee	April Smith	
Petitioner	Jackson Williams	

Figure 1.3 – Data Table


Enter User Information

The user information you enter or select populates the data table.

First Name* <input type="text"/>	Middle <input type="text"/>	Last Name* <input type="text"/>
Address* <input type="text"/>		City* <input type="text"/>
State* <input type="text"/>	Zip* <input type="text"/>	
Phone* <input type="text"/>	Filer ID <input type="text"/>	

Figure 1.4 – Data Fields

Resume Filing

eFileTexas.gov automatically saves a draft of pages where you have completed all required fields. This feature allows you stop work on a filing and resume the filing at a later time. To resume filing of a saved draft, click **WORKSPACE** the link at the top of the page, find your case on the **Filings** screen, and click the  icon to resume your filing.

FILINGS BOOKMARKS TEMPLATES SERVICE CONTACTS					
My Firm All Statuses All Locations From Date <M/d/yyyy> To Date <M/d/yyyy> Case or Envelope Filter Export					
Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName (Hedlund, Deborah)					
Envelope # 4645 filed March 21, 2012 at 3:48 PM by Devon Estes on behalf of Beth Lewandowski					
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Accepted	Judgment	EFileAndServe	Judg	EFS	
Case # 27-ET-CV-12-12 - ()					
Envelope # 4643 filed March 21, 2012 at 3:38 PM by Devon Estes on behalf of Mark Schwartz					
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Accepted	Affidavit and Order for Dismissal	EFile	Power of Atty	DJE 1/1	
Case # 27-CV-12-113 - DJE Plaintiff Biz Pro Se Civ Discrim vs DJE Sarah LastName (Hedlund, Deborah)					
Envelope # 4595 filed March 15, 2012 at 11:43 AM by Devon Estes on behalf of Mark Schwartz					
Status	Filing Code	Filing Type	Filing Description	Reference Number	
Rejected	Amended Petition	EFileAndServe	amended pet	1/3 EFS	
Rejected	Notice of Withdrawal of Counsel	EFile	notice of withdrawal of counsel	2/3 EFO	

Figure 1.5 – eFileTexas.gov Workspace

Error Messages

eFileTexas.gov displays several error messages to alert users when required information is not entered or invalid information is provided.

Password Reset Error Scenarios

Invalid User – To reset the password for your account, you will need to provide the username for the account and answer the security question for the account. **Note: That user does not exist.**

No Security question on File – No security question on file for (username). Your firm administrator may still reset your password. **Note: Reset your password.**

Incorrect

Enter Data in Required Fields

Required fields are those that contain an asterisk (*) next to the field name. If you don't enter the information required into a required field and try to advance, you will receive error messages.

Note: Required fields may vary in different sections.

Look for a field outlined in red in your form. Place the cursor on the outline of the field, and a required field message displays.

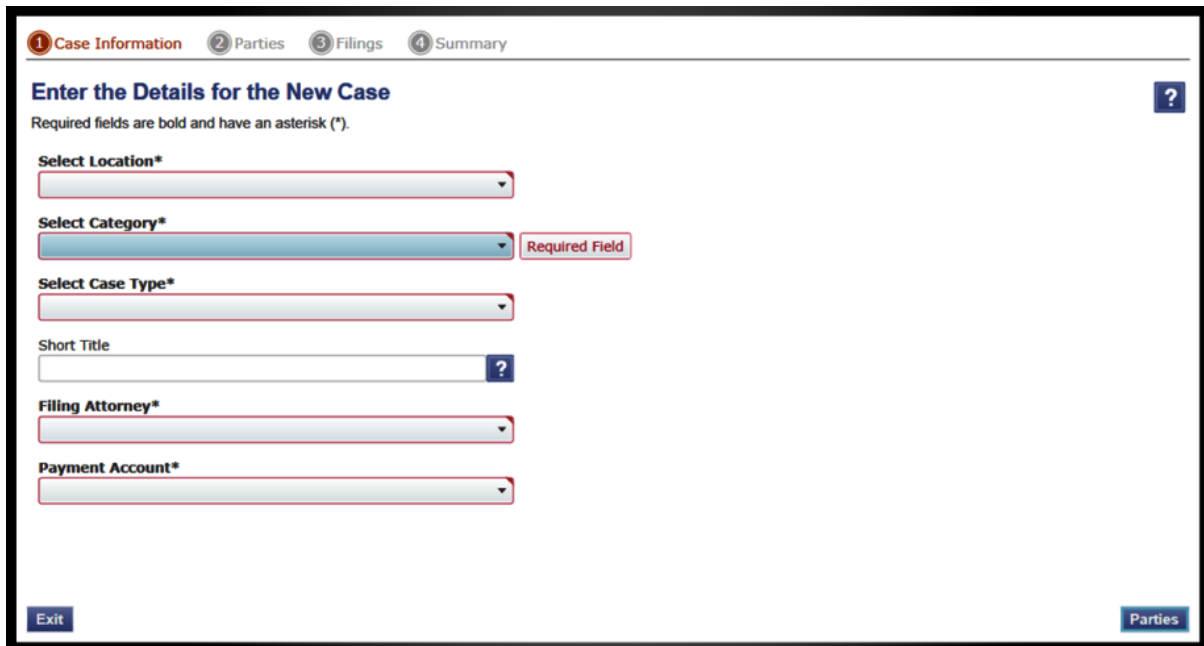
The screenshot shows a web form titled "Enter the Details for the New Case" with a navigation bar at the top containing "Case Information", "Parties", "Filings", and "Summary". The "Case Information" tab is active. Below the title, a note states "Required fields are bold and have an asterisk (*)". The form contains several fields: "Select Location*" (dropdown), "Select Category*" (dropdown with a red "Required Field" label), "Select Case Type*" (dropdown), "Short Title" (text input with a help icon), "Filing Attorney*" (dropdown), and "Payment Account*" (dropdown). All dropdown menus are outlined in red. At the bottom left is an "Exit" button and at the bottom right is a "Parties" button.

Figure 1.6 – Required Field Error Message

Receive Error Messages

When eFileTexas.gov displays an invalid error message, this means a required field must be populated to continue.

If the screen does not change when a navigation button is selected, look for a field outlined in red in your form. Place the cursor on the outline of the field, and an error message displays.

The screenshot shows a close-up of a "Zip*" text input field. The field contains the text "654656" and is outlined in red. To the right of the field is a red button with the text "Invalid Zip Code".

Figure 1.7 – Invalid Entry Error Message

2 eFileTexas.gov Home Page

The eFileTexas.gov home page serves as the gateway to the eFileTexas.gov system. From this screen, you can register, log in, read your court's **Message of the Day**, access the user guides, view training sessions, and get contact information for Technical Support.

The screenshot shows the eFileTexas.gov home page. At the top is the logo, which consists of a blue star with a white outline and the text "EFILETEXAS.gov" in blue and red. Below the logo is a login section on the left with fields for "Email Address" and "Password", a "Keep me logged in" checkbox, and a "LOGIN" button. Below these are links for "Forgot Password?" and "Register Now". To the right of the login section is the "MESSAGE OF THE DAY" section, which says "Welcome to eFileTexas.gov, the free State provided filing option." and includes a link "Click here to learn more about the eFileTexas.gov EFSP" and a note "For the latest news and information about Texas e-filing, please visit www.eFileTexas.gov". At the bottom, there are three columns: "LEARN" with links for "Online Self-study" (Firm Admin - Adding Attorney to Firm, Firm Admin - Adding New Users to Firm, Firm Admin - Registering as a Firm Administrator, Firm Admin - Setting Up a Payment Account as...), "TRAIN" with links for "Free Training Sessions" (Web Conference Training Sessions for Filers, Web Conference Training Sessions for Reviewers), and "SUPPORT" with a link "Need Help? Click Here".

Figure 2.1 – eFileTexas.gov Home Page

Login

The **Login** area allows the user to log in and use the eFileTexas.gov system. Users can log in to eFileTexas.gov by entering their e-mail address and password.

Message of the Day

The **Message of the Day** provides important messages from the court. Check this section daily for important messages from the court.

Learn

The **Learn** section has links to the eFileTexas.gov user documentation. The following types of documents available to help you answer many of your day-to-day operation questions:

- The **eFileTexas.gov User Guide** provides step-by-step instructions on using the eFileTexas.gov system. The user guide covers activities such as logging in to the system, searching for existing cases, selecting the e-file and serve options, performing an e-file and serve, and changing user settings and password.
- The **Firm Administrator Guide** is specifically for the Firm Administrator. This guides covers administrative functions such as registering the firm; managing user, payment, and attorney accounts; and creating and editing the firm's contact lists.
- The **Quick Reference Guide (QRG)** provides only the steps needed to complete common eFileTexas.gov tasks such as logging in to the system, searching for a case, initiating a new case, filing into an existing case, and reviewing the filing status.

- The **Frequently Asked Questions** (FAQ) guide lists the most frequently asked questions from the users. The FAQ covers questions pertaining to eFileTexas.gov functionality.

Training

eFileTexas.gov offers free regularly scheduled online training for eFileTexas.gov. You can register for training online and download user manuals.

- The **Web Conference Training Sessions** are scheduled according to the needs of the courts. Locate your specific court by scrolling through the list of training sessions for your court.
- **Self-study Online Training** is available by clicking on the link and choosing the topic of your choice.

Contact

The eFileTexas.gov Technical Support Team is available to assist all users by calling 855.839.3453 Monday through Friday between the hours of 7 a .m. to 9 p.m. Central Time. You can also contact a Technical Support Representative with your questions by sending an e-mail to efiling.support@tylertech.com or by using the [eFileTexas.gov Chat](#) option.

Registration

Registration is the process of registering a user in the system using their name, contact, and payment information. eFileTexas.gov requires all users – whether Firm Administrators, attorneys, or individuals representing themselves – to be registered in the system.

3 Court Administration

Topics Covered in this Chapter

♦ Approving and Rejecting New Users

The **Court Administration** section allows the Court Administrator to approve or reject new users, manage court users, and modify user accounts.

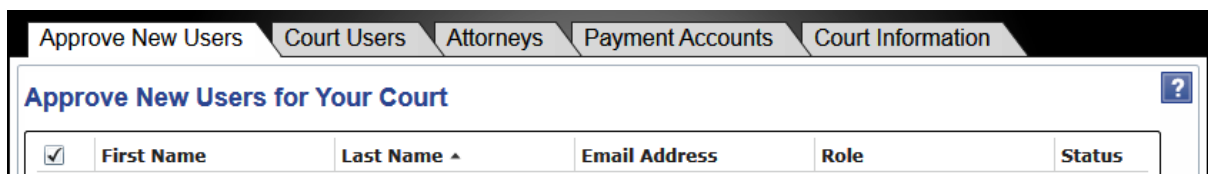
Approving and Rejecting New Users

The Court Administrator approves or rejects new users for the firm. When a user registers for the system, the Firm Administrator receives notification a user has registered and has requested to be added to the firm. Perform the following steps to accept or reject new users:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.

2. Select the **Approve New Users** tab.

The screenshot shows a web application interface with a dark header bar containing five tabs: 'Approve New Users' (selected), 'Court Users', 'Attorneys', 'Payment Accounts', and 'Court Information'. Below the tabs is a white box with the title 'Approve New Users for Your Court' and a help icon (question mark). Underneath is a table with a checkbox in the first column and five headers: 'First Name', 'Last Name ^', 'Email Address', 'Role', and 'Status'.

<input type="checkbox"/>	First Name	Last Name ^	Email Address	Role	Status
--------------------------	------------	-------------	---------------	------	--------

Figure 3.1 – Approve New Users Tab

3. Select the user from the list to approve or reject.
4. Click the **Approve** button to approve the new user, or click the **Reject** button to reject the new user.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

4 Manage Court User Accounts

Topics Covered in this Chapter

- ♦ Adding Court User Accounts
- ♦ Editing Court User Accounts
- ♦ Deleting Court User Accounts

The Court Administrator is responsible for registering and approving new users, adding user accounts, resetting passwords, and activating and deactivating user accounts for the courts.

Adding Court User Accounts

A Court Administrator can add court user accounts.

Note: An asterisk (*) indicates a required field.

Perform the following steps to add a new user account:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.

First Name	Last Name	Email Address	Role	Status
Johnathan	Jawalski	jj@jawaiki.com	Filer, Firm Admin, Court Admin, Review	Active

Add Court User

First Name*
Johnathan

Middle

Last Name*
Jawalski

Email Address*
jj@jawaiki.com

Roles

☒ Court Admin ☒ Filer ☒ Reviewer

☐ Attorney

Figure 4.1 – Court Users Tab Selected

2. Select the **Court Users** tab.
3. Click the **Add Court User** button.
4. Complete the **Add Court User** form.
5. Assign a new court user role.

Roles

- ☒ Court Admin ☒ Filer ☒ Reviewer
- ☐ Attorney

Figure 4.2 – Court User Roles

- a. Select the ☐ Court Admin check box to assign the Court Administrator role to the new user.

- b. Select ☐ **Filer** check box to assign the Filer role to the new court user.
 - c. Select the ☐ **Reviewer** check box to assign the Reviewer role to the new user.
 - d. Select the ☐ **Attorney** check box to assign the Attorney role to the new user.
6. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.
- The new user information is displayed at the top of the screen.

Editing Court User Accounts

The Court Administrator can edit court user accounts.
Perform the following steps to edit the court user account information:

1. Select the **Court Admin** link on the top menu.

The **Court Administrator** function screen opens.

Figure 4.3 – Court Users Tab Selected

2. Select the **Court Users** tab.
3. Select the court user you want to edit from the list.
4. Edit the information in the form.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Deleting Court User Accounts

The Court Administrator can delete user accounts.
Perform the following steps to delete a court user account:

1. Select the **COURT ADMIN** link on the top menu.

The **Court Administrator** function screen opens.

The screenshot shows the 'Court Users' tab selected in the eFileTexas.gov application. The main heading is 'Manage Users for Your Court'. Below this is a table with the following data:

First Name	Last Name	Email Address	Role	Status
Johnathan	Jawalaki	jj@jawalaki.com	Filer, Firm Admin, Court Admin, Review	Active

Below the table is an 'Add Court User' section with the following fields:


- First Name*: Johnathan
- Middle: (empty)
- Last Name*: Jawalaki
- Email Address*: jj@jawalaki.com

Below the fields is a 'Roles' section with the following checkboxes:

- ☒ Court Admin
- ☒ Filer
- ☒ Reviewer
- ☐ Attorney

At the bottom of the form are two buttons: 'Cancel Changes' and 'Save Changes'.

Figure 4.4 – Court Users Tab Selected

2. Select the **Court Users** tab.
3. Select the court user to delete on the list.
4. Click the  button to delete the user from the list.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

5 Manage Court Attorney Accounts

Topics Covered in this Chapter

- ♦ Adding Court Attorney Accounts
- ♦ Editing Court Attorney Accounts
- ♦ Deleting Court Attorney Accounts

The Court Administrator is responsible for managing attorney accounts for the courts.

Adding Court Attorney Accounts

The Court Administrator can add attorneys to the court's user accounts or the attorney list. Perform the following steps to add an attorney to the attorney list:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.

2. Select the **Attorneys** tab.

First Name	Last Name ^	Attorney Number
Johnney	Macafee	32123

Add Attorney

First Name* Johnney Middle E Last Name* Macafee

Attorney Number* 32123 Verify

☒ Save Attorney as Court User

Roles

☒ Court Admin ☒ Filer

Email Address* je@macafee.com

Cancel Changes Save Changes

Figure 5.1 – Manage Court Attorneys Screen


3. Click the **Add Attorney** button.

Note: An asterisk (*) indicates a required field.

4. Enter the attorney's first and last name in the fields provided.
5. Enter the attorney number in the **Attorney Number** field.

A form field for an attorney number. It consists of a text input box containing the number '32123' and a blue button labeled 'Verify' to its right. Above the input box is the label 'Attorney Number*' with a small information icon.

Figure 5.2 – Attorney Number Field

6. Click the  button to verify the attorney number is correct and registered with the court.

The **Verify Attorney Information** window opens and loads the attorney information registered with the court.

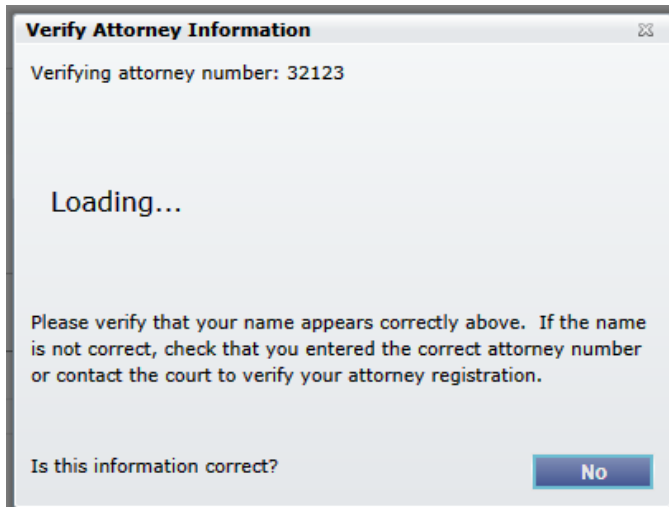
A dialog box titled 'Verify Attorney Information'. It displays 'Verifying attorney number: 32123' and 'Loading...'. Below this, it says 'Please verify that your name appears correctly above. If the name is not correct, check that you entered the correct attorney number or contact the court to verify your attorney registration.' At the bottom, it asks 'Is this information correct?' with a blue button labeled 'No'.

Figure 5.3 – Verify Attorney Information Window

Note: If the attorney information is incorrect, select the  button to correct the information. This takes you back to the Attorney tab.

7. Select the ☒ **Save Attorney as Court User** check box to save the attorney as a court user (optional).
8. Assign the court attorney roles.

Roles

☒ **Court Admin** ☒ **Filer**

Figure 5.4 – Court User Roles

- a. Select ☐ **Court Admin** to assign the Court Administrator role to the new attorney.
- b. Select ☒ **Filer** to assign the Filer role to the new attorney.
9. Type the attorney's e-mail address.

Email Address*

je@macafee.com

Figure 5.5 – E-mail Address Field

10. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Editing Court Attorney Accounts

The Court Administrator can edit the attorney's information using the **Attorneys** screen.

Perform the following steps to edit the information entered for each attorney:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.

2. Select the **Attorneys** tab.

Figure 5.6 – Manage Court Attorneys Screen

3. Select the attorney you want to edit from the list.
4. Edit the information in the form.

Note: An asterisk (*) indicates a required field.

5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Deleting Court Attorney Accounts

The Court Administrator can delete an attorney's account using the **Attorneys** screen.

Perform the following steps to delete an attorney account:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.


2. Select the **Attorneys** tab.

The screenshot displays the 'Manage Attorneys for Your Court' interface. At the top, there are tabs for 'Approve New Users', 'Court Users', 'Attorneys', 'Payment Accounts', and 'Court Information'. The 'Attorneys' tab is selected. Below the tabs, the title 'Manage Attorneys for Your Court' is shown. A table lists the current attorneys:

First Name	Last Name ^	Attorney Number
Johnny	Macafee	32123

Below the table is an 'Add Attorney' button. The form for adding a new attorney includes fields for 'First Name*' (Johnny), 'Middle' (E), and 'Last Name*' (Macafee). There is also a field for 'Attorney Number*' (32123) with a 'Verify' button. A checkbox 'Save Attorney as Court User' is checked. Under the 'Roles' section, 'Court Admin' and 'Filer' are both checked. An 'Email Address*' field contains 'je@macafee.com'. At the bottom of the form are 'Cancel Changes' and 'Save Changes' buttons.

Figure 5.7 – Manage Court Attorneys Screen

3. Select the attorney you want to delete from the list.
4. Click the  button next to the attorney's name to delete the attorney from the list.
5. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

6 Manage Court Payment Accounts

Topics Covered in this Chapter

- ♦ Adding Court Payment Accounts
- ♦ Editing Court Payment Accounts
- ♦ Deleting Court Payment Accounts

The Court Administrator is responsible for managing payment accounts for vendor and statutory filing fees. Courts can have multiple payment accounts if needed. Credit cards and waivers are both valid forms of payment for vendor and statutory fees.

Adding Court Payment Accounts

All courts are required to have a payment account in order to file electronically. The Court Administrator adds payment accounts for the courts.

Perform the following steps to add a payment account for your court:

1. Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.

2. Select the **Payment Accounts** tab.

The screenshot shows the 'Payment Accounts' tab selected in the 'Court Administrator' interface. The top navigation bar includes 'Approve New Users', 'Court Users', 'Attorneys', 'Payment Accounts', and 'Court Information'. The 'Payment Accounts' tab is active. Below the navigation bar, there is a table with the following data:

Payment Account Name	Payment Account Type	Active	Deleted
Chapel Hill Credit	Credit Card	No	Deleted
Orange County Waiver	Waiver	No	Deleted
Islip County Draw Down	Draw Down	No	

Below the table, there are buttons for 'Add Payment Account' and 'Refresh'. The 'Add Payment Account' form is visible, with the following fields:

- Payment Account Name***: A text input field with 'Chapel Hill Credit' entered.
- Payment Account Type***: A drop-down menu with 'Credit Card' selected. Below the menu, there are buttons for 'Enter Credit Card Information', 'Enter Draw Down Information', and 'Enter Waiver Information'.

At the bottom of the form, there are buttons for 'Cancel Changes' and 'Save Changes'.

Figure 6.1 – Payment Accounts Tab Selected

3. Click the **Add Payment Account** button.
4. Complete the **Add Payment Account** form.
 - a. Type a payment account name.
 - b. Select a payment account type (credit card, draw down, or waiver) using the drop-down list.
 - c. Select **Credit Card** if the payment account is a credit card.
 - d. Click the **Enter Credit Card Information** button to enter your credit card information.

Note: You are re-directed to a secure payment processing site to enter your credit card information.

- e. Select **Draw Down** if the payment account is a draw-down account.
- f. Click the **Enter Draw Down Information** button to select a draw-down account.

The **Draw Down** selection window opens.

Payment Account Name*
Islip County Draw Down

Payment Account Type*
Draw Down [Enter Draw Down Information](#)

Guadalupe County
Harding County in Roy
Hatch
Hildago County in Lordsburg
Hobbs
Jal Circuit
Las Cruces
Las Vegas 4th District

Figure 6.2 – Draw Down Selection Window

- g. Select a draw-down account using the drop down list.
 - h. Select **Waiver** if the payment account is a waiver.
5. Click the [Save Changes](#) button to save the changes and continue, or click the [Cancel](#) button to cancel any changes made.

The payment account information is displayed at the top of the screen.

Editing Court Payment Accounts

After a payment account has been entered, only the payment account name and the payment account type can be changed. You cannot edit credit card information after it has been entered. Instead, delete the payment account, and add a new one.

Perform the following steps to edit a payment account for your court:

1. Click the [COURT ADMIN](#) link on the top menu on the home page.

The **Court Administrator** function screen opens.

2. Select the **Payment Accounts** tab.

Payment Accounts

Payment Account Name	Payment Account Type	Active	Deleted
Chapel Hill Credit	Credit Card	No	Deleted
Orange County Waiver	Waiver	No	Deleted
Islip County Draw Down	Draw Down	No	

[Add Payment Account](#) [Refresh](#)

Payment Account Name*
Chapel Hill Credit

Payment Account Type*
Credit Card [Enter Credit Card Information](#)

[Cancel Changes](#) [Save Changes](#)

Figure 6.3 – Payment Accounts Tab Selected

3. Select the court payment account you want to edit from the list.
4. Edit the payment account name or type in the form.

- Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

Deleting Court Payment Accounts

The Court Administrator is responsible for deleting payments accounts. Perform the following steps to delete a payment account for your court:

- Click the **COURT ADMIN** link on the top menu on the home page.

The **Court Administrator** function screen opens.


- Select the **Payment Accounts** tab.

The screenshot shows the 'Payment Accounts' tab selected in the 'Court Administrator' interface. The top navigation bar includes 'Approve New Users', 'Court Users', 'Attorneys', 'Payment Accounts', and 'Court Information'. The 'Payment Accounts' tab is active. Below the navigation bar, there is a table with the following data:

Payment Account Name	Payment Account Type	Active	Deleted
Chapel Hill Credit	Credit Card	No	Deleted
Orange County Waiver	Waiver	No	Deleted
Islip County Draw Down	Draw Down	No	

Below the table, there are buttons for 'Add Payment Account' and 'Refresh'. Below these buttons is a form to add a new payment account. The form has two fields: 'Payment Account Name*' and 'Payment Account Type*'. The 'Payment Account Name*' field contains 'Chapel Hill Credit'. The 'Payment Account Type*' field is a dropdown menu with 'Credit Card' selected. There is a button 'Enter Credit Card Information' next to the dropdown. At the bottom of the form, there are buttons for 'Cancel Changes' and 'Save Changes'.

Figure 6.4 – Payment Accounts Tab Selected

- Select the firm payment account to delete from the list.
- Click the  button next to the name in the list to delete the payment account..
- Click the **Save Changes** button to save the changes and continue, or click the **Cancel** button to cancel any changes made.

The payment account information is deleted in the table at the top of the screen.

7 Manage Court Information

Topics Covered in this Chapter

♦ Updating Court Information

The Court Administrator uses the **Court Information** tab to update the contact information for the courts (name, address, phone number). The Court Administrator can also use the **Court Information** tab to manage the registration process by maintaining the authority to register new users or allowing users to self register.

Updating Court Information

Use the **Court Information** form to update your court's contact information, change how a new user registers to use the system, allow the users to self-register, or change the approval process.

Perform the following steps to update court information:

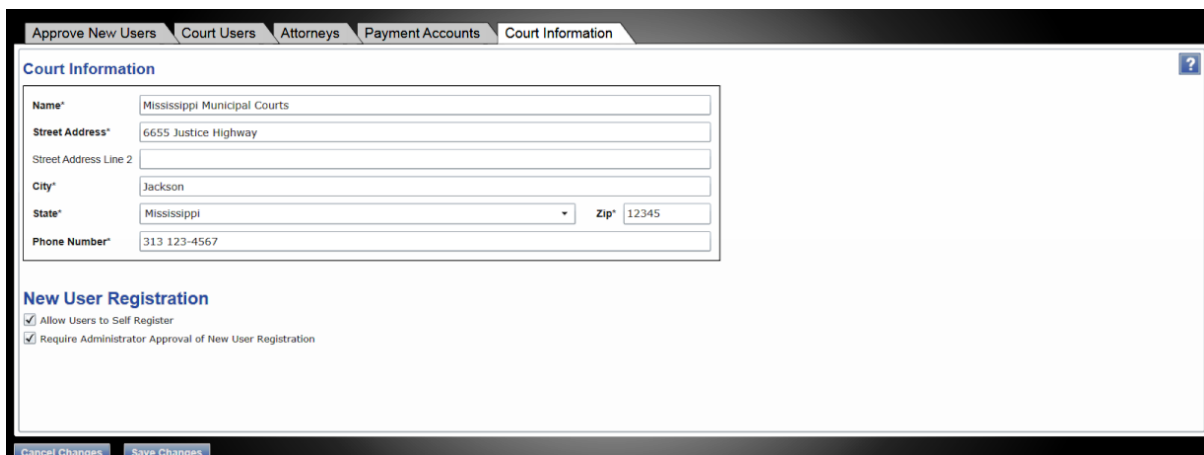


Figure 7.1 – Court User Information Screen

1. Click the **COURT ADMIN** link on the top menu on the home page.
The **Court Administrator** function screen opens.
2. Select the **Court Information** tab.
The **Court Information** window opens.
3. Update the **Court Information** form as needed.
4. Click the **Save Changes** button to save the changes and continue, or click the **Cancel Changes** button to cancel any changes made.

The information entered here updates the court's information on the **Court Information** screen.